Utah State Division of Substance Abuse & Mental Health

PATS
PREVENTION COORDINATOR AREA PLAN INFORMATION (PCAPI)
USER MANUAL

VERSION 3.0

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Table of Contents:

Introduction:

The Prevention Coordinator Area Plan Information application (PCAPI) is designed to give the local Prevention Coordinator the ability to add and/or modify their own Area Plan programs. In addition, the software allows the Coordinator to add/modify their own Areas, Locations, and Target Populations.

The content of this user manual is partitioned into three sections:

[Section I] consists of the policies and procedures which govern the use of PCPAI and PATS.

[Section II] contains a presentation of how data security works in PATS.

[Section III] contains a flow diagram that displays how the information flows from PCAPI into PATS (i.e. how an Area Plan program relates to, and controls, the data that is collected and entered for the delivery of the program in PATS).

[Section IV] contains a high level description regarding PATS three-step data entry process.

[Section V] presents the simple "Does and Don'ts" related to using PCAPI. The "Does and Don'ts represent some of the basic operations, such as saving a record, adding a record, etc.

 [Section VI] consists of the instructions for how to add/modify an Area, a Location, a Target Population, an Area Plan, and a Category.

Section I: Policies and Procedures

[A] Data Submission

Each Local Authority is required to submit the data regarding the delivery of their prevention services no later than thirty days after the service begins. Likewise, the data entry for each session of the service must be completed thirty days after it is delivered.

Prevention Coordinators have the ability to indicate, in PCAPI, which fiscal quarter(s) a given service they anticipate it will be delivered within. The fiscal quarters are:

Quarter One	July 1 through September 30
Quarter Two	October 1 through December 31
Quarter Three	January 1 through March 31
Quarter Four	April 1 through June 30

The data entered into PATS is saved and stored on a real time basis. As a result, the moment a piece of information is saved in PATS it can be instantly seen in the system and/or in a report. Since PATS is a "real time" system, the Division of Substance & Mental Health recommends that the user simply go about performing their data entry on a regular daily, weekly, or monthly routine with consideration of the thirty day data entry dead line. If the data is entered on a reasonable, consistent schedule as described above, then the user and their Local Authority agency need not feel concerned about satisfying the dead line because compliance with it is built into such a schedule by default.

[B] Issue Ticket

In order to serve PATS users with a formal process for documenting problems and questions which arise with use of the software, the Division has created a procedure for addressing such items. Each user who experiences a problem, raises an issue, or has a question regarding the use of PATS must submit an "Issue Ticket" to the Division of Substance Abuse which details what the problem, issue, or question is.

The process for submitting the ticket is described below.

[1] The user must go to the Division's website and navigate to the page which contains the hyperlinks for PATS (**http://www.hsdsa.utah.gov/DSA_Web_Links.htm**)

[2] After navigating to the Web Page, the user must click on the "PATS Issue Ticket Form" hyperlink.

[3] After the form has loaded, the user must fill in:
  a. The user's name **(required)**
  b. The user's Local Authority agency **(required)**
  c. The user's telephone number **(required)**
  d. The description of the problem or issue **(required)**
  e. If an error occurred, then the error message must be included on the form **(required when an error is involved)**
  f. Add any other pertinent information

[4] When the form is completely filled out, the user must click on the "Submit" button located at the bottom of the form.

[5] After the Issue Ticket has been submitted, the Division will address the ticket with five working days of receiving it.

[C] Accessing PATS & Its Reports

Accessing PATS

PATS should **<u>ONLY</u>** be accessed through the Division's website. The URL for PATS is subject to change by forces outside of the Division's control. Consequently, the Division created a Web Page in its site which contains a hyperlink to PATS (**http://www.hsdsa.utah.gov/DSA_Web_Links.htm**). The user is welcome to bookmark the Web Page. However, they should **<u>NOT</u>** bookmark the software URL because when it changes the bookmark will not automatically point to the new URL.

The communication between the user's computer and PATS is digitally encrypted in order to protect the communication link from being hacked into from someone outside of State government. Even so, the probability that someone can somehow circumvent the digital security can increase if the communication link is left open indefinitely. Consequently, the PATS software will "Time Out" if it is not used for more than 30 minutes. If the "Time Out" function is engaged, then the software will abort the user's current session. Aborting the session means that the user will have to log into PATS again before they can use the software.
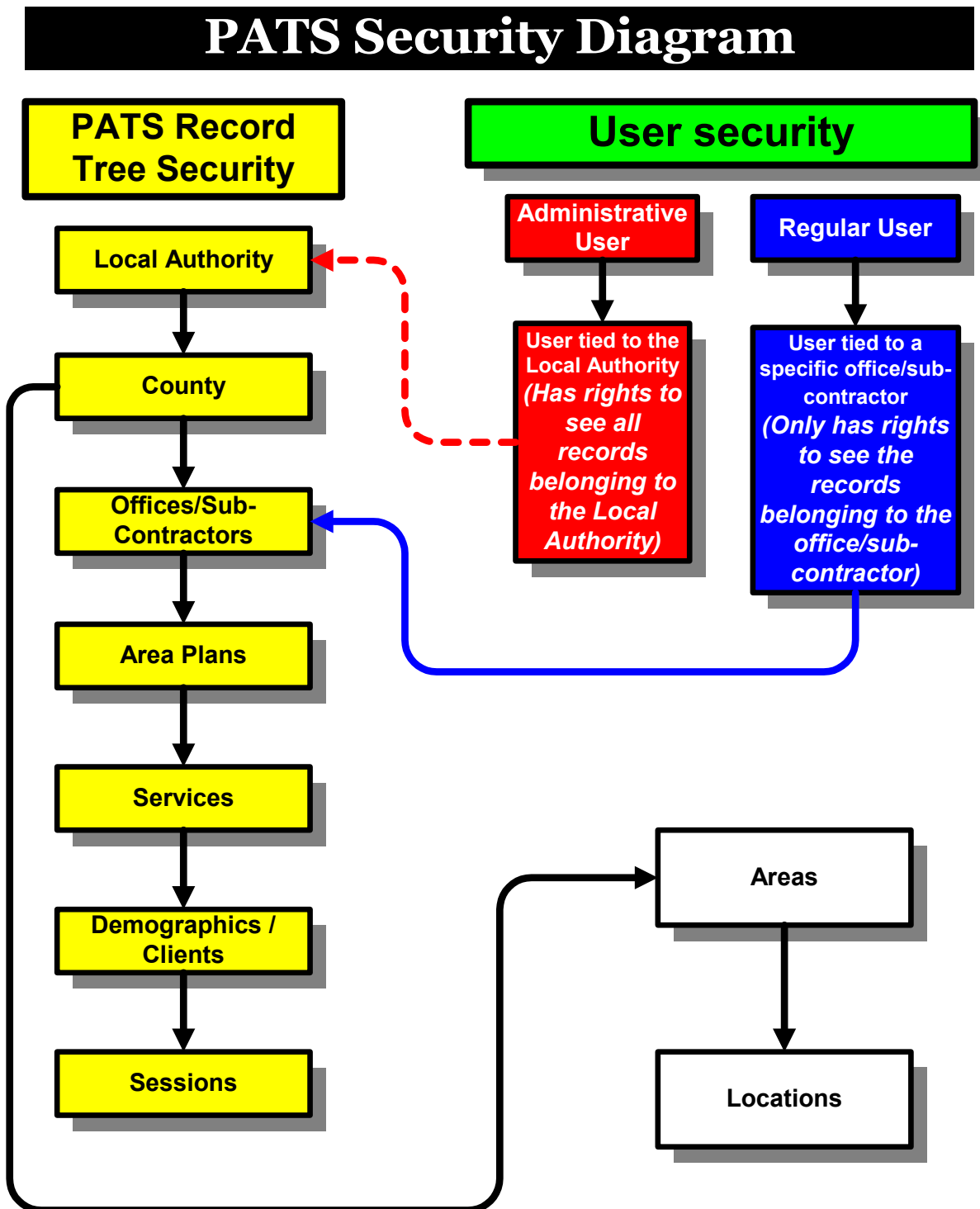
PATS Reports

The PATS Reports for a given Local Authority will also be accessible through the same Web Page described above via the "PATS Reports" hyperlink.

[D] User Security

       In accordance with The Utah State Department of Human Service's security policy, each time a user adds or modifies a record within PATS, the user's ID will be added to the given record when it is newly saved or updated along with the date the transaction takes place. The practice of recording the User's ID serves the purpose of making each user accountable and responsible for the information they manage, add, modify, etc., in PATS. As a result of the policy, each user of PATS can not, under any circumstances, reveal their user ID and password to any individual other than State staff who work in the Department of Human Services or the Division of Information Technology Services (ITS).

       If a user does reveal their ID and password to another individual who then uses it to gain access to PATS illegitimately, then the owner of the ID is responsible and liable for any transactions that are made in the software and its database for good or bad because their ID will be stored in the database along with the affected data.

Section II: PATS Data Security

PATS Security Diagram

PATS Record Tree Security

User security

Administrative User	Regular User

Local Authority

County

Offices/Sub-Contractors

Area Plans

Services

Demographics / Clients

Sessions

Administrative User: User tied to the Local Authority *(Has rights to see all records belonging to the Local Authority)*

Regular User: User tied to a specific office/sub-contractor *(Only has rights to see the records belonging to the office/sub-contractor)*

Areas

Locations

[Figure 1]

PATS Security Documentation:

       PATS security is designed with two levels of user access that controls what an individual user can see. One user type is **Administrative**. The other user type is **Regular**. Administrative users can see all of the data that belongs to the Local Authority they are assigned to. The Regular user can only see the data that belongs the office(s) he/she is assigned to. Hence, depending upon what designation a specific user is given by DSAMH staff (i.e. Administrative or Regular), the user will be restricted in regard to what they can and cannot see.

1. Administrative Users

       As Figure 1 depicts, an Administrative user is assigned to a Local Authority. Typically, the Prevention Coordinator is assigned as an Administrative User. The assignment dictates that the Prevention Coordinator can see all of the counties, offices/sub-contractors, Area Plans, Services, Demographics/Clients, and Sessions that are entered in PATS for the specific Local Authority the Coordinator works for.

2. Regular Users

       As Figure 1 depicts, a Regular user is assigned to a specific Office/Sub-contractor. Typically, the regular prevention worker is assigned as a Regular User. The assignment dictates that the prevention worker can **only** see the Area Plans, Services, Demographics/Clients, and Sessions that are entered in PATS for the specific Office(s)/Sub-contractor(s) the user is assigned to.
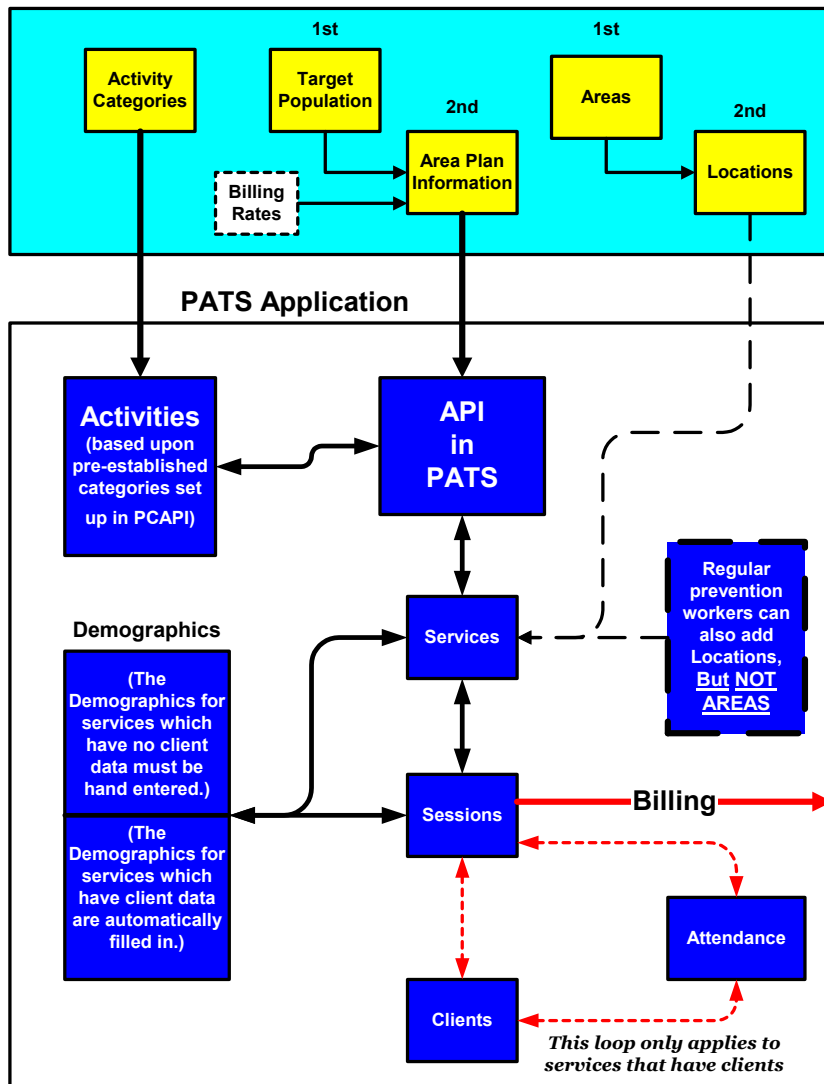
3. Areas & Locations

       Areas are generalized regions within a county where prevention services are delivered (i.e. a city, a neighborhood, a school district, etc.). Locations represent specific coordinates where the service is delivered (i.e. the Washington Library, Tintic Elementary School, the Beaver Office, etc.).

       Areas are assigned to a county. Locations are assigned to an Area. Consequently, a user can only see the areas and locations which are assigned to the county(ies), and subsequently the office(s)/sub-contractor(s), he/she is attached to. In addition, if two or more offices/sub-contractors exist within the same county, the user(s) assigned to them can see all of the Areas and Locations associated with the county because Offices/Sub-contractors are tied to a county just as Areas/Locations are. However, even though PATS allows a user from one Office to see the locations created for another Office which resides in the same county, it **does not** allow him/her to see the other Office's Area Plans, Services, Demographics/Clients, and Sessions (see Figure 1). Hence, the security described for Regular Users remains intact even though a user can see all of the Locations entered for the county. As a result, Areas and Locations have no bearing on or relevance in determining what Area Plans, Services, etc., a Regular User can see.

Section III – Data Flow For PCAPI, PATS, & Billing

Prevention Coordinator Area Plan Information (PCAPI) Application
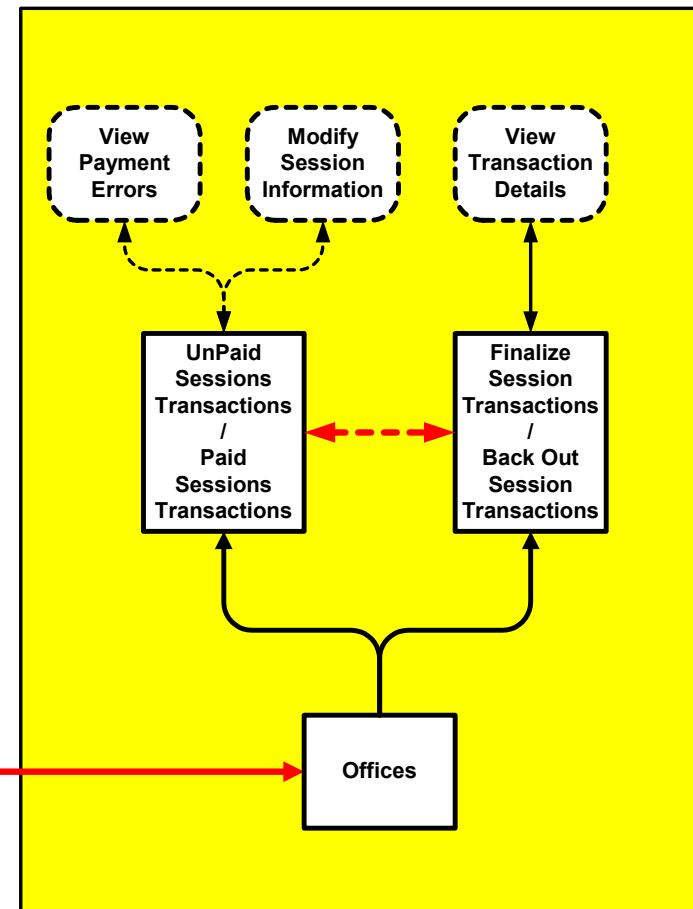
PATS Billing Application

Activity Categories

1st
Target Population

2nd
Area Plan Information

Billing Rates

1st
Areas

2nd
Locations

View Payment Errors

Modify Session Information

View Transaction Details

UnPaid Sessions Transactions / Paid Sessions Transactions

Finalize Session Transactions / Back Out Session Transactions

PATS Application

Activities
(based upon pre-established categories set up in PCAPI)

API in PATS

Demographics

(The Demographics for services which have no client data must be hand entered.)

(The Demographics for services which have client data are automatically filled in.)

Services

Regular prevention workers can also add Locations, But NOT AREAS

Sessions

Billing

Offices

Attendance

Clients

This loop only applies to services that have clients

[Diagram 1]

Diagram 1 shows that the PATS software actually consists of three major parts. PCAPI, PATS, and PATS Billing. The following discusses how all three applications work together.

1. **PCAPI:**
   - PACPI is used by the Prevention Coordinators to create/set up the data regarding Area Plan prevention programs, Areas, Locations, Target Populations, and Activities. The data entered into PCAPI flows into PATS such that the regular PATS user does not have to renter the information (i.e., once the risk/protective factors, billing information, descriptions, domains, etc., are entered in PCAPI for a prevention program, the regular PATS user does not have to reenter all of that information).

2. **PATS:**
   - PATS is used to collect data about the planning/preparation for and delivery of prevention services. On the delivery side of PATS, three major kinds of data are collected. They are: selecting a prevention program previously set up in PCAPI, entering the demographic or client data on the people served, and entering sessions. On the activity (planning/preparation) side of PATS, the details of the specific planning/preparation effort is collected.

3. **PATS Billing:**
   - PATS Billing is used to process the billing which is applied to a specific session of prevention service.

Section IV – PATS Data Entry Process

[Figure 1]

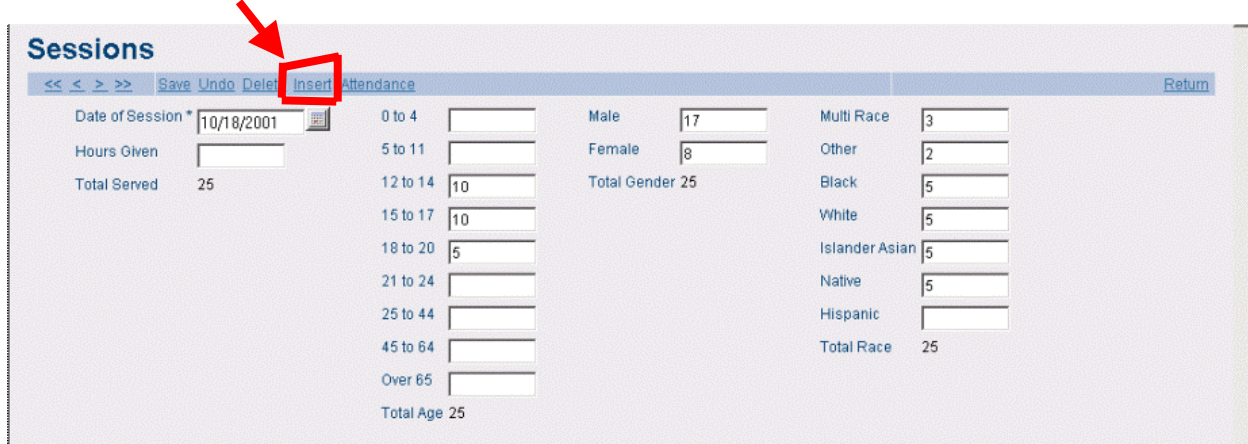The process for entering data in PATS generally consists of three-steps.   They are:

[1] creating a Service.

[2] creating general Demographic or Client specific data.

[3] creating Sessions.

Regardless of the kind of service that is entered into PATS, the user should follow each step.

As Section III in this document describes, data flows from the PCAPI application into PATS for the purpose of reducing and simplifying the data entry that a PATS user must do for a given Service. One significant type of data that flows from PCAPI is the designation that the Service will either require Demographic or Client specific data (please see *Section VI: Subsection G* in the *PCAPI User Manual*.) If the Service is marked as requiring demographic data, then Step 2 in Figure 1 above is addressed by simply filling in the demographic data (please see *Section VII – Subsections A or C* in the *PATS User's Manual*). However, if the Service is marked as requiring client specific data, then Step 2 in Figure 1 above is addressed by creating a client roster (please see *Section VII – Subsection B* in the *PATS User's Manual*). In addition, if client data is required, the session attendance will be collected from the "attendance" that is marked for each session from the client roster (please see *Section VII – Subsection B* in the *PATS User's Manual*).
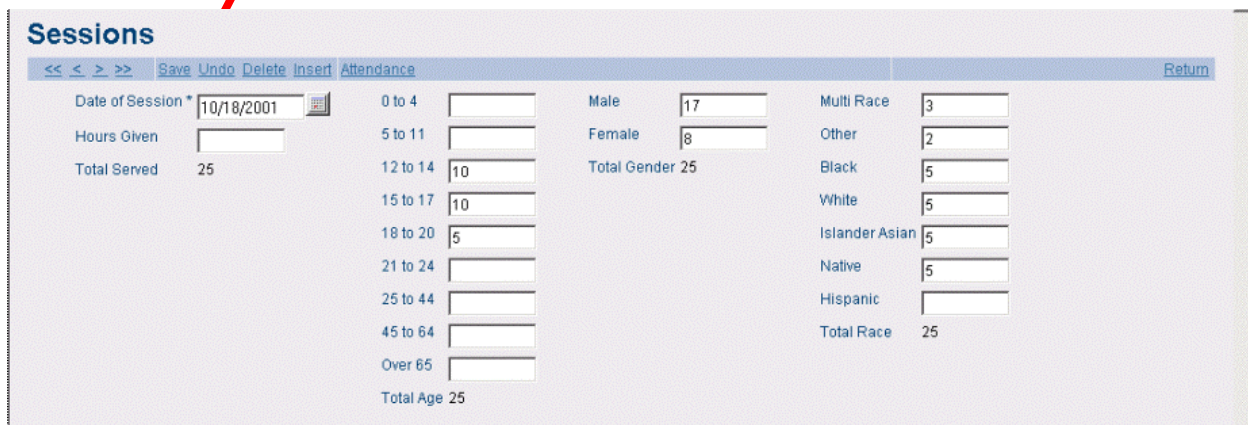
Section V – Does & Don'ts

1. Do use the **INSERT** button in order to type data in fields on the screen.
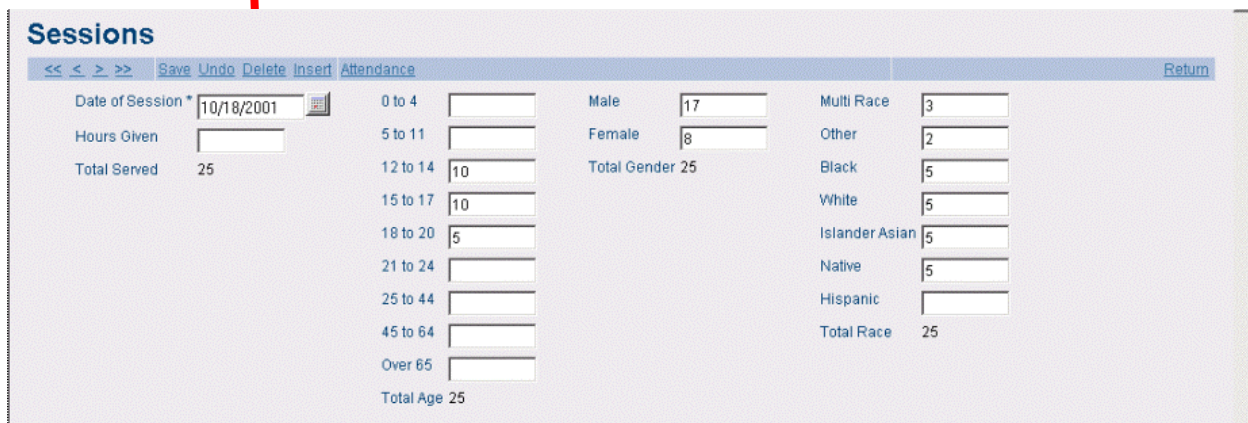
2. Do use the **SAVE** button to save the data entered on the screen.
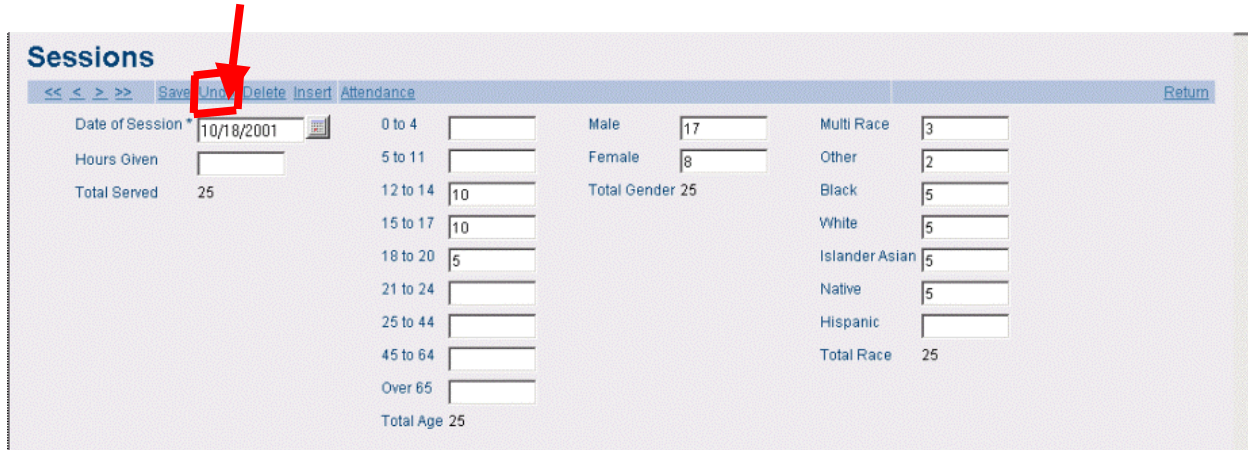
3. Do use the **DELETE** button to remove data previously saved in the database.
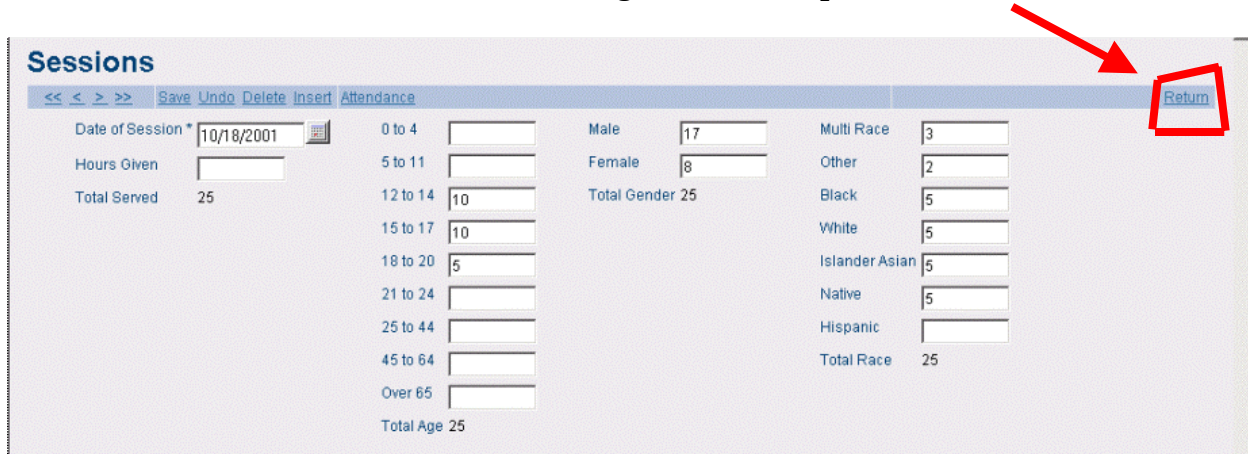
4. Do use the **<u>UNDO</u>** button to erase data from the screen without saving it.

5. Do use the **<u>RETURN</u>** Button in order to go back to the previous screen.
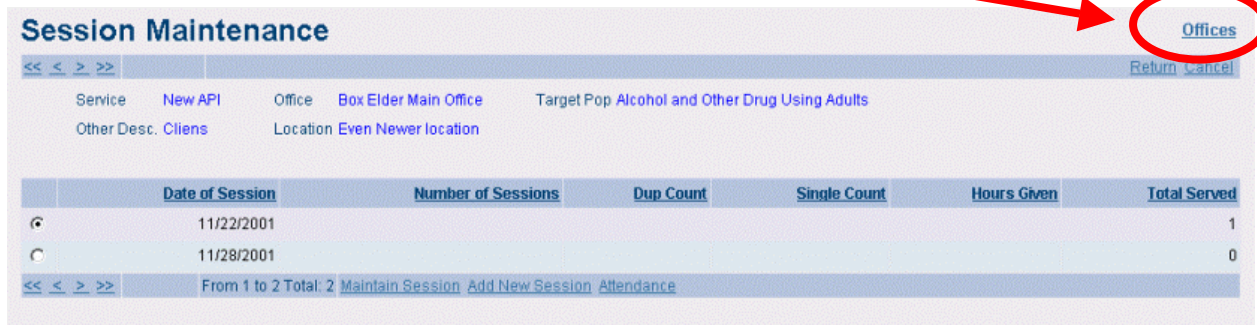
6. **Do Not** use the **<u>BACK</u>** button located on your browser to return to a previous screen.
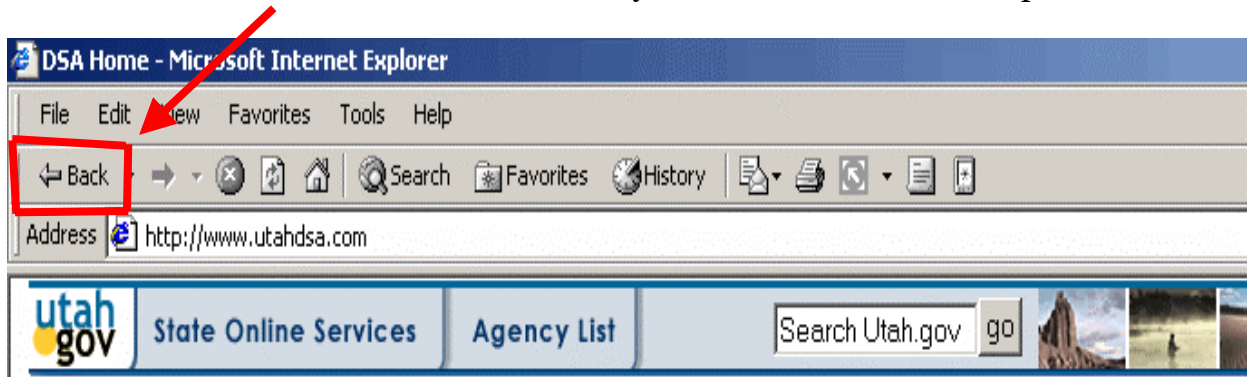
7. Do use the **Offices** button to travel directly from the Sessions, Clients, or Attendance screens back to the Satellite Offices screen.
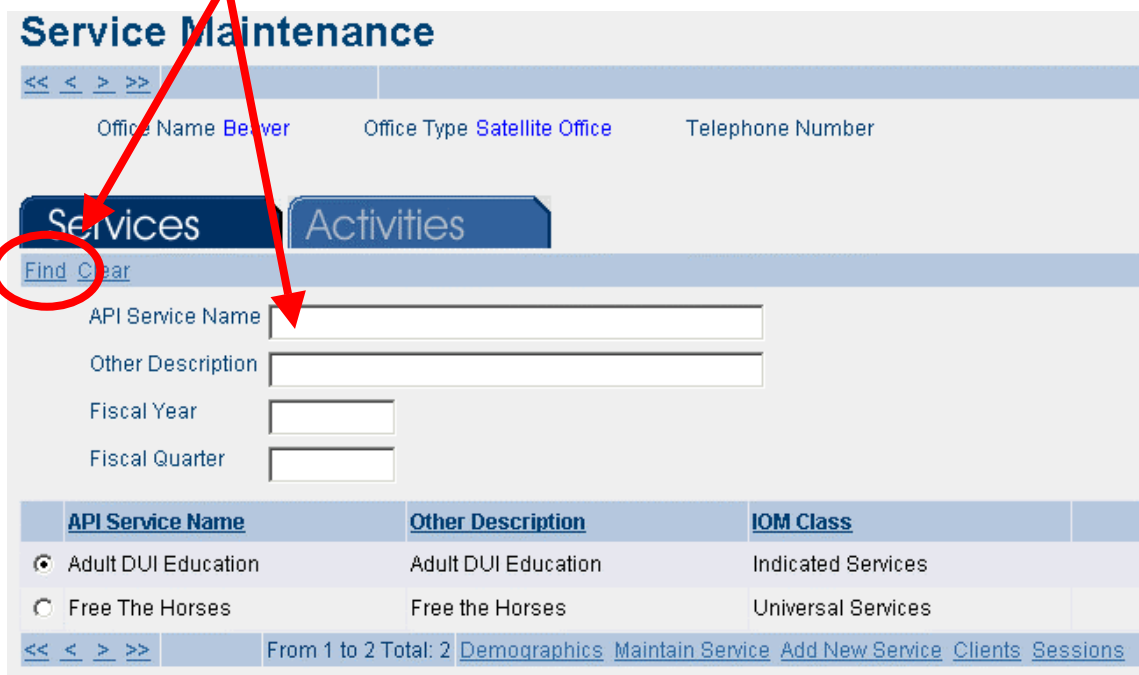
8. Do use the **Find** button to search for an item based upon the criteria contained in the search fields located on the screen.

Section VI – How To Use PCAPI At A Glance

        PCAPI is designed to be an administrative tool that the Prevention Coordinator can use to customize and manage the way data is used and entered inside of PATS for their respective Local Authorities. For the purposes of this manual, the five data entry functions inside of PCAPI will be discussed as twelve subsections within Section VI. They are:

Subsection A – How to add an Area
Subsection B – How to modify an Area
Subsection C – How to add a Location
Subsection D – How to modify a Location
Subsection E – How to add a Target Population
Subsection F – How to modify a Target Population
Subsection G – How to add an Area Plan Program
Subsection H – How to modify an Area Plan Program
Subsection I – How to add a Category
Subsection J – How to modify a Category
Subsection K – How to add a billing rate for an Area Plan Program
Subsection L – How to modify a billing rate

        The instructions for each subsection are designed to give the user a quick, condensed review of each step required to complete the data entry process for each item listed above.

Subsection A – How To Add An Area

Step 1.
Click on the
Areas Tab

| Logoff | Areas | Locations | Target Pop | Area Plan | Categories |

Areas

Find Clear

Area Name [   ]

County Name [   ] ▽

Area Name
⦿ Beaver Area
○ Box Elder Area
○ Box Elder Communities
○ Cache Area
○ Cache Communities
○ Carbon Area
○ Daggett Area
○ Davis Area
○ Duchesne Area
○ Emery Area

<< < > >>   From 1 to 10 Total: 10+ Add New Area

Step 2.
Click on the
Add New Area
button

Areas

<< < > >| Save Undo Delete Insert   Return Cancel

Area Name * [   ]
County Name [   ] [▼]

Required Fields On The "Areas" Screen:

- **Area Name** *(The name of the Area that resides in the selected County. **[Note:** an Area can be equal to or less than the actual region covered by the County. An Area can not exceed the region covered by the County**]**).*
- **County Name** *(The name of the County).*

Subsection B – How To Modify An Area

Step 1.
Click on the **Areas** Tab

| Logoff | Areas | Locations | Target Pop | Area Plan | Categories |

Areas

Find Clear

Area Name [   ]

County Name [   ] [∨]

Area Name

- ○ Beaver Area
- ○ Box Elder Area
- ○ Box Elder Communities
- ○ Cache Area
- ○ Cache Communities
- ○ Carbon Area
- ○ Daggett Area
- ○ Davis Area
- ○ Duchesne Area
- ○ Emery Area

<< < > >>   From 1 to 10 Total: 10+ Add New Area

Step2 *(if applicable).*
Type the name of Area in the **Area Name** text box and the click on the **Find** button to find the desired Area.

Step3.
When the name of the desired Area appears, click on it.

Areas

<< < > >> | Save Undo Delete Insert | Return Cancel

Area Name *

County Name ▽

Step 4.
Make the desired changes and then click the **Save** button.

Subsection C – How To Add A Location

Step 1.
Click on the **Locations** Tab

| Logoff | Areas | Locations | Target Pop | Area Plan | Categories |

Locations

Find Clear

Location Name [   ]

Education Level [▼]

Area Name [   ] [▽]

Location Name	Education Level
Antimony Elementary	Elementary
Beaver Elementary	Elementary
Beaver Jr. High/Middle	Jr. High/Middle (Public)
Beaver Library	Other
Beaver Senior High	Senior High (Public)
Box Elder Elementary	Elementary
Box Elder Jr. High/Middle	Jr. High/Middle (Public)
Box Elder Library	Other
Box Elder Senior High	Senior High (Public)
Bryce Valley	Jr. High/Middle (Public)

Step 2.
Click on the **Add New Location** button.

<< < > >>   From 1 to 10 Total: 0+ Add New Location

Locations

<< < > >> Save Undo Delete Insert

Location Name * [   ]

Education Level * [▼]

Area Name [   ]

Step 3.
Add the desired information. Then click on the **Save** button.

Required Fields On The "Locations" Screen:
- **Location Name** *(the name of the specific location).*
- **Education Level** *(the level of education served consistently at the location. If no level is appropriate, select OTHER).*
- **Area Name** *(the Area the Location is within).*

Subsection D – How To Modify A Location

Step 1.
Click on the **Locations** Tab

Logoff Areas Locations Target Pop Area Plan Categories

Locations

Find Clear

Location Name

Education Level

Area Name

Step 2 (If applicable).
Type the search criteria in the fields provided (i.e the name of the Location) and then click on the **Find** button.

Location Name	Education Level
Antimony Elementary	Elementary
Beaver Elementary	Elementary
Beaver Jr. High/Middle	Jr. High/Middle (Public)
Beaver Library	Other
Beaver Senior High	
Box Elder Elementary	
Box Elder Jr. High/Middle	
Box Elder Library	
Box Elder Senior High	Senior High (Public)
Bryce Valley	Jr. High/Middle (Public)

<< < > >>   From 1 to 10 Total: 10+ Add New Location

Step 3.
Select the name of the desired Location.

Locations

<< < > >> Save Undo Delete Insert

Location Name * [   ]

Education Level * [▼]

Area Name [   ] [▽]

Step 4.
Make the desired changes. Then click the **Save** button.

Subsection E – How To Add A Target Population

Step 1.
Click on the
Target Pop
Tab

| Logoff | Areas | Locations | Target Pop | Area Plan | Categories |

Target Population

Find Clear

Target Pop Name [   ]

Risk Code [   ] ▼

Risk Name [   ]

Target Pop Short Name	Target Pop Name
2nd and 3rd Graders	2nd and 3rd Graders
Academically At Risk Youth	Academically At Risk Youth
Adult Drug Court	Adult Drug Court
AOD using Adults	Alcohol and Other Drug Using Adults
AOD using Youth	Alcohol and Other Drug Using Adults
Alcohol Retailers	Alcohol Retailers
Alternative School Youth	Alternative School Youth
Cache & Box Elder Communities	Cache & Box Elder Communities
Child Care Providers	Child Care Providers
Children of AOD	Children of Alcohol and Other Drug Users

<< < > >>   From 1 to 10 Total: 10+ Add New Target Population

Step 2.
Click on the
Add New
Target
Population
button

Target Populations

<< < > >> Save Undo Delete Insert

Target Pop Short Name *

Target Pop Name *

Risk Code *

Risk Name

Step 3.
Enter the desire
information.
Then click on the **Save**
button.

Required Fields On The "Target Population" Screen:
- **Target Pop Short Name** *(The shortened/abbreviated name of the Target population).*
- **Target Pop Name** *(The complete name of the Target Population).*
- **Risk Code** *(select the CSAP Risk Category code which best applies to the target population.)*

Note: if the name of the Target Population is short to begin with, then both text boxes can contain the same information.

Subsection F – How To Modify A Target Population

Step 1.
Click on the
Target Pop Tab

| Logoff | Areas | Locations | Target Pop | Area Plan | Categories |

Target Population

Find Clear

Target Pop Name [　　　　　　　　　　]

Risk Code [　　　] ▽

Risk Name [　　　　　　　　　　]

Step 2 (if applicable).
Type the desired
search criteria in the
appropriate text
boxes (i.e. type the
name of the Target
Population in its text
box). Then click on
the **Find** button.

Target Pop Short Name	Target Pop Name
2nd and 3rd Graders	2nd and 3rd Graders
Academically At Risk Youth	Academically At Risk Youth
Adult Drug Court	Adult Drug Court
AOD using Adults	Alcohol and Other Drug Using Adults
AOD using Youth	g Adults
Alcohol Retailers	
Alternative School Youth	
Cache & Box Elder Communities	es
Child Care Providers	
Children of AOD	Drug Users

<< < > >>   From 1 to 10 Total: 10+ Add New Target Population

Step 3.
When it appears,
click on the name of
the Target
Population.

Target Populations

<< < > >> Save Undo Delete Insert

Target Pop Short Name *

Target Pop Name *

Risk Code *

Risk Name

Step 4.
Make the desired changes and then click on the **Save** button.

Subsection G – How To Add An Area Plan Program

Step 1.
Click on the **Area Plan** Tab.

Logoff	Areas	Locations	Target Pop	Area Plan	Categories

Area Plan Information

Find Clear

API Service Name	
Other Description	
Service Name	
Office Name	
Fiscal Year	

API Service Name	**Other Description**	**Service Name**
360 - Meetings	General meetings for prevention activities	Planning Meetings
360 - Meetings	General meetings for prevention activities	Planning Meetings
Across Ages	Dealing with Seniors	Across Ages
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)
After School Programs	Kids After School	After School
Adult DUI Education	Adult DUI Education	Driving Under the Influence (PRI)
After School Programs	Kids After School	After School Program
Behavioral Monitoring	Monitoring Behavioral Areas	Bry's Beh

<< < > >>   From 1 to 10 Total 10+ Add Area Plan

Step 2.
Click on the **Add Area Plan** button.

Step 3.
Add the appropriate information for the program. Then click on the **Save** button.

Required Fields On The "Area Plan Information" Screen:

- **API Service Name** *(the name of the Area Plan Program – can be a code value or any other designation originated by the Local Authority)*
- **Service Name** *(the name for the program assigned by the State Division)*
- **Select At Least one Domain Name** *(i.e. Community, Family, etc.)*
- **IOM Class** *(i.e. Universal, Selected, or Indicated)*
- **Target Population Name** *(the name of the Target Population addressed by the program)*
- **Fiscal Quarter** *(the quarter(s) in which the program is anticipated to be delivered)*
- **Office Name** *(the name of the office which will deliver the program)*
- **Fiscal Year** *(the Fiscal Year during which the program will be delivered)*
- **Risk Factors** *(the risk factors that are addressed by the program)*
- **Protective Factors** *(the protective factors that are addressed by the program)*

Required Billing Fields On The "Area Plan Information" Screen:
(if the program will be designated as requiring Fee-For-Service-Billing, the following data must be filled in)
- **Billing** *(the designation of whether or not the program requires the Fee-For-Service Billing functionality – If the box is checked, it = Yes. If the box is unchecked, it = No)*
- **Payment Process** *(the designation of what kind of payment process the program must be subject to when the billing functionality is run)*
- **Contract Amount** *(the amount of the contract the program is subject to when the billing functionality is run)*

Optional Fields On The "Area PLan Information" Screen:
- **Other Description** *(a brief description of the Area Plan Program).*
- **Number Served** *(an estimate for the total number of people who will be served by the program)*
- **Cost of Program** *(the cost of purchasing/implementing the program)*
- **Funding Source** *(the source(s) which fund the program)*

Fields On The "Area Plan Information" Screen That Control Data Entry In PATS: *(These items reinforce specific business rules in PATS such that a user can only enter client data, or demographic data, or can not add or modify a service or its sessions after a given date).*
- **Multiple Sessions** *(If Multiple Sessions is **NOT** checked, then only one session can be entered for service/program in PATS. If Multiple Sessions **IS** checked, then an unlimited number of sessions can be entered for the service/program in PATS).*
- **Clients** *(If Clients is **NOT** checked, then demographic data must be filled in for the service/program in PATS. If Clients **IS** checked, then client specific data must be filled in for the service/program in PATS).*
- **Lock After Date** *(All service/session related data in PATS for a specific Area Plan Program and Fiscal Year **CAN NOT** be added to, modified, etc., once the calendar date in the field is passed. The calendar date, however, can be changed to whatever date the user sees fit. Even so, the default value of the date is the July 15th immediately following the end of the Fiscal Year for which the Area Plan Program was created).*

! Caution! **Some data items on the "Area Plan Information" screen significantly and dramatically impact data in the database if they are changed**

1. **Clients:** If the Clients check box in an existing Area Plan Program is changed, then all of the data entry completed for it (i.e. meaning the demographic or client data and the attendance of each session) will be deleted from the database for the fiscal year to which they belong. The consequence of changing the Clients check box means that all of the deleted information will have to be reentered by hand to satisfy the new condition

that the check box reflects. For example, if an Area Plan Program originally marked as requiring demographic data (Clients is not checked) is changed to require client data, then all of the demographic records for all of the services entered for that specific program must be replaced with client rosters for the fiscal year to which they belong. Likewise, the attendance for each session of that Area Plan Program must also be reentered by taking role off of the client roster (see *B3. Modify a client's session attendance* in the *PATS User Manual*).

2. **Contract Amount:** If the contract amount of an existing Area Plan Program is reduced from its original amount, then all of the finalized billing transactions which belong to it will be credited. Consequently, the transactions will have to be reprocessed and repaid under the new value of the contract during the next billing cycle. In addition, all un-finalized transactions which belong to the Area Plan Program will be deleted and then reprocessed during the next billing cycle.

3. **Fiscal Year:** If the fiscal year for an existing Area Plan Program is changed, then the user's ability to change or add to its services/demographics/sessions will be affected. For example, if an Area Plan created for FY2003 is changed to FY2004 when the current fiscal year is 2003, then the Area Plan will no longer be available for data entry in PATS until FY2004 rolls around.

4. **Lock After Date:** The lock after date prevents the services/demographics/sessions for a given Area Plan from being changed or added to after the lock after date has passed. For example, if the lock after date for an Area Plan is set for 7/15/2003, then none of its records can be changed after the 15th.

Subsection H – How To Modify An Existing Area Plan Program

Step 1.
Click on the
Area Plan
Tab

| Logoff | Areas | Locations | Target Pop | Area Plan | Categories |

Area Plan Information

Find Clear

API Service Name	
Other Description	
Service Name	
Office Name	
Fiscal Year	

Step 2 (if applicable).
Type the search criteria in the desired fields (i.e. type the name of the program in the API Service Name field). Then click on the **Find** button.

API Service Name	Other Description	Service Name
360 - Meetings	General meetings for prevention activities	Planning Meetings
360 - Meetings	General meetings for prevention activities	Planning Meetings
Across Ages	Dealing with Seniors	Across Ages
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)
Adult DUI Education	Adult DUI Education	nce Program
After School Programs	Kids After School	
Adult DUI Education	Adult DUI Education	DUI Offenders
After School Programs	Kids After Sch	Children of Divorc
Behavioral Monitoring	Monitoring Behavioral Areas	Bry's Behavioral Monitoring	Child Care Provid

Step 3.
After the name of the desired program appears, click on its name.

<< < > >>   From 1 to 10 Total: 10+ Add Area Plan

Areas   **Locations**   **Target Pop**   **Area P**

Area Plan Information

<< < > >>   Save Undo Delete Insert Copy **Services Activities Rates**   cel

Step 4.
Make whatever modifications are necessary. Then click on the **Save** button.

API Service Name	6th Sense Teacher Consult	Office Name	Cornerstone Cou
Other Description	Objective 11	Provider Name	Salt Lake
Service Name	Across Ages ▽	Cost of Program	
Description		SICA Funding	☑
		SAPT Grant Funding	☐
		State General Funding	☐
Community	☐	County General Funding	☐
Family	☑	DOE Law Funding	☐
Peer	☐	DOE Funding	☐
School	☐	Other Funding	☐
IOM Class	Universal Services ▾	Other Funding Desc.	
Multiple Sessions	☑	Fiscal Year *	2003
Clients	☐	Lock After Date	07/15/2003
Number Served		Billing	☑
Target Pop Name	Academically At Risk Youth ▽	Process Payment	Yes - Process Normally ▾
Risk Name	Other - specify	Contract Amount	$9,030.00
Quarter 1	☑	Changed Date	08/22/2002
Quarter 2	☐	Changed By	cpetersen
Quarter 3	☐	Add Date	08/20/2002
Quarter 4	☐	Add User	genichol

Risk   **Protective**

	Risk Code		**Risk Factor**	
○	RC07	▽		▽
○	RC07	▽		▽
⦿	RC07	▽		▽

<< < > >> Delete Insert From 1 to 3 Total: 3

Subsection I – How To Add An Activity Category

Step 1.
Click on the **Categories** Tab.

Logoff	Areas	Locations	Target Pop	Area Plan	Categories

Activity Categories

Find **Clear**

Category [   ]

Description [   ]

Step 2.
Click on the **Add New Categories** button.

Category	Description	
		No records found!

<< < > >>   From 1 to 1 Total 0 **Add New Category**

Activity Category

Step 3.
Fill in the appropriate information. Then click on the **Save** button.

Provider Name

Category

Description

Required Fields On The "Activity" Screen:

- **Provider Name** *(i.e. the name of the Local Authority)*.
- **Category** *(the name of the Category)*.

Optional Fields On The "Activity" Screen:

- **Description** *(the description of the Category)*

Subsection J – How To Modify A Category

Step 1.
Click on the
Categories
Tab.

Logoff | Areas | Locations | Target Pop | Area Plan | Categories

Step 2 (if applicable).
Type the desired search criteria
in the fields. Then click on the
Find button.

Activity Categories

Find **Clear**

Category [   ]

Description [   ]

Step 3.
Click on the name of
the Category.

Category	Description	Provider Name
		No records found!

<< < > >>   From 1 to 1 Total: 0 **Add New Category**

Activity Category

<< < > >> Save Undo Delete Insert

Provider Name [   ] [▽]

Category [   ]

Description [   ]

Step 4.
Modify the information as desired. Then click on the **Save** button.

Subsection K – How To Add A Billing Rate For An Area Plan Program

Step 1.
Click on the Area Plan tab.

| Logoff | Areas | Locations | Target Pop | Area Plan | Categories |

Area Plan Information

Find Clear

API Service Name	
Other Description	
Service Name	
Office Name	
Fiscal Year	

API Service Name	Other Description	Service Name	
360 - Meetings	General meetings for prevention activities	Planning Meetings	
360 - Meetings	General meetings for prevention activities	Planning Meetings	
Across Ages	Dealing with Seniors	Across Ages	
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)	
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)	
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)	
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)	
Adult DUI Education	Adult DUI Education	Driving U... (PRI)	
After School Programs	Kids After School	After Sch...	
Adult DUI Education	Adult DUI Education	Driving Under the Influe... (PRI)	
After School Programs	Kids After School	After School Prog...	Children of Divorc...
Behavioral Monitoring	Monitoring Behavioral Area...	Bry's Behavioral Monitoring	Child Care Provid...

<< < > >>   From 1 to 10 Total 10+ Add Area Plan

Step 2.
Click on the **Add Area Plan** button.

Step 4.
Click the **Rates** button.

Step 3.
Fill in the appropriate information for the Area Plan – including the billing fields on this screen. Then click the **Save** button.

| Logoff | Areas | Locations | Target Pop | Area Plan | Categories |

Area Plan Information

<< < > >> Save Undo Delete Insert Copy **Services Activities Rates**

API Service Name	6th Sense Teacher Consult	Office Name	
Other Description	Objective 11	Provider Name	
Service Name	Across Ages ▽	Cost of Program	
Description		SICA Funding	☑
		SAPT Grant Funding	☐
		State General Funding	☐
Community	☐	County General Funding	☐
Family	☑	DOE Law Funding	☐
Peer	☐	DOE Funding	☐
School	☐	Other Funding	☐
IOM Class	Universal Services ▽	Other Funding Desc.	
Multiple Sessions	☑	Fiscal Year *	2003
Clients	☐	Lock After Date	07/15/2003
Number Served		Billing	☑
Target Pop Name	Academically At Risk Youth ▽	Process Payment	Yes - Process Normally ▽
Risk Name	Other - specify	Contract Amount	$9,030.00
Quarter 1	☑	Changed Date	08/22/2002
Quarter 2	☐	Changed By	cpetersen
Quarter 3	☐	Add Date	08/20/2002
Quarter 4	☐	Add User	genichol

| Risk | Protective |

	Risk Code	Risk Factor
○	RC07 ▽	▽
○	RC07 ▽	▽
●	RC07 ▽	▽

<< < > >> Delete Insert From 1 to 3 Total: 3

Rates

<< < > >> | Save Undo Delete Insert

API Service Name   Rick's Test API

Other Description

Begin Date *   [   ] [📅]

End Date *   [   ] [📅]

Rate   [   ]

Calculation Method *   [▼]

Minimum People   [   ]

Maximum People   [   ]

Minimum Hours   [   ]

Maximum Hours   [   ]

Step 5.
Fill in the appropriate fields. Then click the **Save** button.

Required Rate Fields On The "Rates" Screen:
- **Begin Date** *(The date the rate is effective)*
- **End Date** *(The date the rate is no longer effective)*
- **Calculation Method** *(The method for calculating the rate)*
- **Rate** *(The fixed dollar value that will be used in calculating the rate)*

Optional Rate Fields On The "Rates" Screen:
- **Minimum People** *(The minimum number of people who can attend a session for it to be billable)*
- **Maximum People** *(The maximum number of people who can attend a session for it to be billable)*
- **Minimum Hours** *(The minimum number of hours a session must last for it to be billable)*
- **Maximum Hours** *(The maximum number of hours a session must last for it to be billable)*

Subsection L – How To Modify An Existing Rate

Step 1.
Click on the **Area Plan** tab.

| Logoff | Areas | Locations | Target Pop | Area Plan | Categories |

Step 2 (if applicable).
Type the desired search criteria in the appropriate fields (i.e. enter the name of Area Plan Program in the API Service screen). Then click the **Find** button.

Area Plan Information

Find Clear

API Service Name	
Other Description	
Service Name	
Office Name	
Fiscal Year	

API Service Name	**Other Description**	**Service Name**		
360 - Meetings	General meetings for prevention activities	Planning Meetings		
360 - Meetings	General meetings for prevention activities	Planning Meetings		
Across Ages	Dealing with Seniors	Across Ages		
Adult DUI Education	Adult DUI Education	Driving Under the Influence Program (PRI)		
Adult DUI Education	Adult DUI Educa	luence Program		
Adult DUI Education	Adult DUI Educa	uence Program		
Adult DUI Education	Adult DUI Educa	uence Program		
Adult DUI Education	Adult DUI Educa	uence Program		
Adult DUI Education	Adult DUI Educatio	uence Program		
After School Programs	Kids After Scho	After School Programs		
Adult DUI Education	Adult DUI	Driving Under the Influence Program (PRI)	DUI Offenders	
After School Programs	Kids After School	After School Programs	Children of Divorc	
Behavioral Monitoring	Monitoring Behavioral Areas	Bry's Behavioral Monitoring	Child Care Provid	

<< < > >>   From 1 to 10 Total: 10+ Add Area Plan

Step 3.
When the name of the Area Plan Program appears, **click on its name**.

Step 4.
Click the **Rates** button.

Logoff Areas   Locations   Target Pop   Plan   Categories

Area Plan Information

<< < > >>   Save Undo Delete Insert Copy   **Services Activities Rates**   Return Cancel

API Service Name	6th Sense Teacher Consult	Office Name	Cornerstone Counseling Center ▽
Other Description	Objective 11	Provider Name	Salt Lake
Service Name	Across Ages ▽	Cost of Program	
Description		SICA Funding	☑
		SAPT Grant Funding	☐
		State General Funding	☐
Community	☐	County General Funding	☐
Family	☑	DOE Law Funding	☐
Peer	☐	DOE Funding	☐
School	☐	Other Funding	☐
IOM Class	Universal Services ▽	Other Funding Desc.	
Multiple Sessions	☑	Fiscal Year *	2003
Clients	☐	Lock After Date	07/15/2003
Number Served		Billing	☑
Target Pop Name	Academically At Risk Youth ▽	Process Payment	Yes - Process Normally ▽
Risk Name	Other - specify	Contract Amount	$9,030.00
Quarter 1	☑	Changed Date	08/22/2002
Quarter 2	☐	Changed By	cpetersen
Quarter 3	☐	Add Date	08/20/2002
Quarter 4	☐	Add User	genichol

Risk   Protective

	Risk Code		Risk Factor	
○	RC07	▽		▽
○	RC07	▽		▽
●	RC07	▽		▽

<< < > >> Delete Insert From 1 to 3 Total: 3

Rates

<< < > >>

	API Service Name Per Session API	Other Description

	Begin Date	
○	07/01/2002	002
○	09/02/2002	/30/2002
⦿	12/01/2002	06/30/2003

<< < > >> From 1 to 3 Total 3 **Maintain** **Add New Rate**

Step 5.
Click on the **button** which corresponds to the desired rate. Then click on the **Maintain** button.

Rates

<< < > >> Save Undo Delete Insert

API Service Name   Rick's Test API

Other Description

Begin Date *   [   ] 🔲

End Date *   [   ] 🔲

Rate   [   ]

Calculation Method *   [▼]

Minimum People   [   ]

Maximum People   [   ]

Minimum Hours   [   ]

Maximum Hours   [   ]

Step 6.
Make the desired changes. Then click the **Save** button.